STREETSMART PRO®

GETTING STARTED

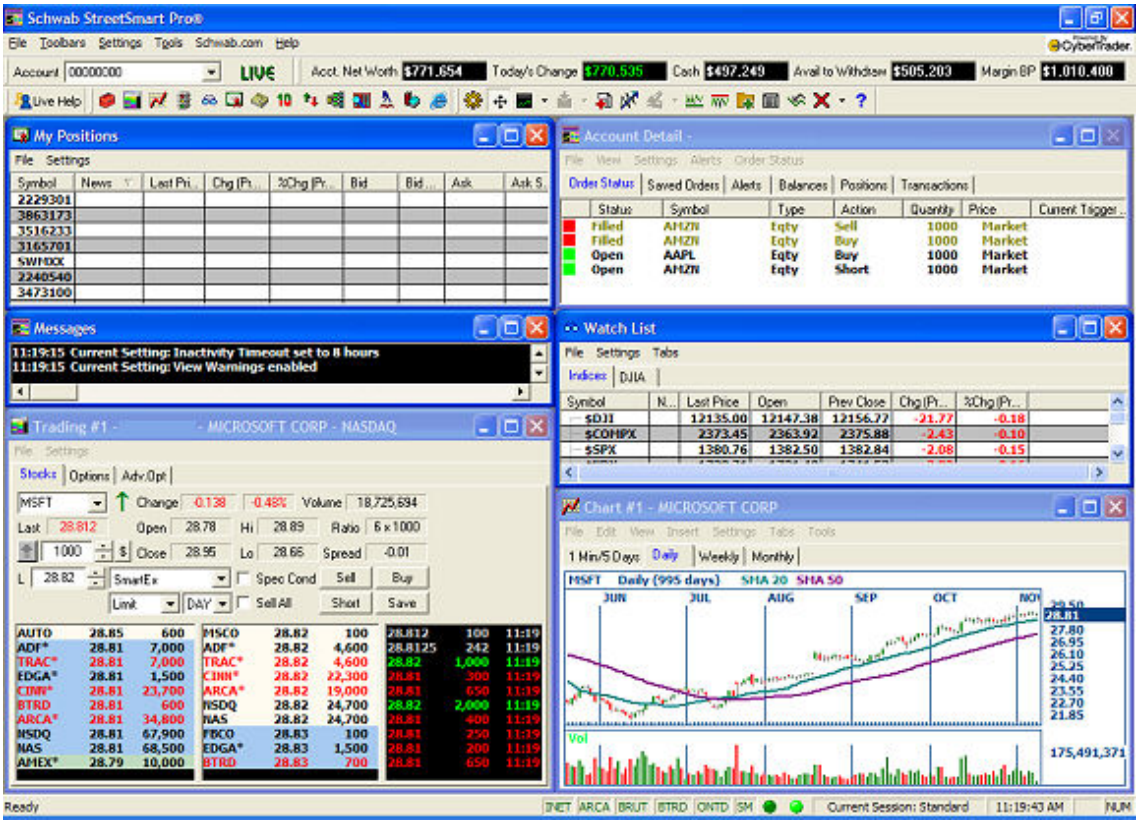
Getting Started..... 1
Getting Started..... 2
New Features..... 4
Logging On & Off..... 9
Main Menu Bar.....10
Demo Mode.....19
Customizing Your Desktop.....20
Configuration & Troubleshooting.....29
Quick Reference.....37

Getting Started

Welcome to StreetSmart Pro®, Schwab's customizable trading cockpit with advanced market information for your desktop.

Qualified Schwab Active Trader clients can stay plugged into the fast-changing market with StreetSmart Pro, Schwab's leading-edge suite of real-time streaming market data software and advanced trading features for your desktop.

See the **New Features** in this version of StreetSmart Pro!



StreetSmart Pro features a customizable cockpit display that keeps key market information on display without switching applications, including:

QUOTES AND TRADING

View potential liquidity with a detailed view of market activity that includes quotes from ECNs and market makers. Approved traders get direct access to ECNs, including INET, NYSE Arca, ONTD BTRD, and BRUT. Approved clients can utilize a wealth of option trading strategies, including multi-leg complex options.

NOTE: Access to Level II data requires meeting certain eligibility requirements based on trading frequency. For additional information, please contact your Schwab Active Trader Team.

See Trading Overview for more information.

MARKET DATA TOOLS

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Customize and save a virtually unlimited number of streaming, real-time watch lists. Get real-time streaming headlines providing you with news on the market or companies you want to watch. View streaming updates on the day's top ten leading gainers, decliners and volume movers for the NASDAQ and New York / American Stock Exchanges. Get instant feedback on stocks reaching or approaching their daily and/or 52-week highs and lows.

CHARTING AND STRATEGY TOOLS

View, Create, and change real-time streaming intraday, daily, and weekly charts with a wide choice of technical indicators. Compare stocks against each other or against indices, and construct custom technical analysis displays using the Strategy Tools.

SOPHISTICATED RISK MANAGEMENT TOOLS

The StreetSmart Pro Alert Window can automatically notify you of potential opportunities or prompt you to protect your positions, based upon the Alerts you create. The Special Conditional Orders (an Alert Action choice) can automatically place a trade for you if the Alert conditions you specify are met. Alerts can be set up and then saved directly to your desktop, reducing the time spent creating alerts daily.

STOCK SCREENER

The Stock Screener allows you to quickly find the stocks that meet your trading strategy. The Stock Screener comes with built-in queries, or you can create and save your own queries by choosing from many filter variables.

DEMO MODE

In Demo Mode, you can test your trading strategies without risking capital using real-time data while simultaneously learning to use your software.

ONE-CLICK RESEARCH

Access in-depth, independent reports on schwab.com for the latest fundamental research.

EDUCATION WEB LINK

Quickly link to all of the online training and educational material available at the StreetSmart Pro Center with a direct toolbar link.

December 13, 2006

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New Features

The following enhancements are new to StreetSmart Pro® software version 4.5. These enhancements are grouped by topic and under each new feature is a hyperlink to direct you to the specific section of Online Help where this item is discussed.

LAYOUT & CUSTOMIZATION

BACKUP LAYOUTS

The software will now save a backup of your layout on your computer, so that if your layout becomes corrupted or you save changes to it that you wish to reverse, you don't have to start from scratch.

More on Backup Layouts

CUSTOMIZABLE BALANCES BAR

Select from 20+ account statistics to display at the top of your trading window at all times. To enable this feature, click ***View > Balances Bar*** in the main menu.

You can select which statistics to display by clicking on ***Settings > Balances Bar*** in the main menu or by right-clicking on the Balances Bar and selecting ***Balances Bar...***

You can also change any of the statistics to another statistics on the fly by right-clicking on the name of the stat and selecting a different one from the drop-down list.

More on the Balances Bar

ENHANCED PRINTING FEATURES

Under the ***File*** menu in windows that allow printing, a new option called ***Page Setup*** allows you to customize your printouts with headers, footers, grid lines, etc.

More on Printing Windows

LINKS TO SCHWAB.COM

In the main menu bar, click on the ***Schwab.com*** menu to access links back to various Schwab.com features, such as research, market analysis, and much more.

More on the Main Menu Bar

NEWS

ENHANCED NEWS INTERFACE

The News window has been updated to be more streamlined and intuitive, as well as to include the ability to search for recent news based on News Codes.

More on News

WATCH LISTS

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NEW WATCH LIST COLUMNS

Several new Watch List Columns have been added including the display of market data for Opening and Closing Cross orders. NASDAQ and NYSE accept and store on-close order types that are executable only at market close. Leading up to the close, the exchanges disseminate information about order imbalances in the closing book, along with an indicative closing price.

At 4:00 p.m., Eastern Time (ET), the closing book and the continuous book are brought together to create a single Closing Cross.

The new columns include:

Column Short Name Name assigned in Watch List Column	Column Name	Description
Close Far $	Far Clearing Price	The Close Crossing price at which orders in the closing book would clear against each other. NASDAQ stocks only.
Close Imbalance	Close Imbalance Quantity	The number of closing shares that would remain unexecuted at the current reference price and the side of the imbalance (buy, sell, or none if there is no imbalance). Applies to both NASDAQ and NYSE stocks.
Close Near $	Near Clearing Price	The Close Crossing price at which orders in the closing book and continuous book would clear against each other. NASDAQ stocks only.
Close Paired	Number of Paired Shares	The number of closing shares that are able to be paired off at the current reference price. Applies to both NASDAQ and NYSE stocks.
Close Ref $	Current Reference Price	A Close price within the NASDAQ inside at which paired shares are maximized, the imbalance is minimized and the distance from the bid-ask midpoint is minimized. Applies to both NASDAQ and NYSE stocks.
Ending Ask	Ending Ask	Ending ask of the regular trading session
Ending Bid	Ending Bid	Ending bid of the regular trading session
NYSE Ask	NYSE Ask Price	Current NYSE ask price
NYSE Ask Size	NYSE Ask Size	Displays the highest number of shares available from a specific MM/ECN within the inside NYSE Ask.
NYSE Bid	NYSE Bid Price	Current NYSE Bid price.
NYSE Bid Size	NYSE Bid Size	Displays the highest number of shares available from a specific MM/ECN within the inside NYSE Bid.

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Open Far $	Far Clearing Price	The Open Crossing price at which orders in the opening book would clear against each other. NASDAQ stocks only.
Open Imbalance	Open Imbalance Quantity	The number of opening shares that would remain unexecuted at the current reference price and the side of the imbalance (buy, sell, or none if there is no imbalance). NASDAQ stocks only.
Open Near $	Near Clearing Price	The Open Crossing price at which orders in the opening book would clear against each other. NASDAQ stocks only.
Open Paired	Number of Paired Shares	The number of opening shares that are able to be paired off at the current reference price. NASDAQ stocks only.
Open Ref $	Current Reference Price	An Open price within the inside at which paired shares are maximized, the imbalance is minimized and the distance from the bid-ask midpoint is minimized. NASDAQ stocks only.

More on Watch Lists

CHARTS

NEW STUDY - PARABOLIC SAR

The Parabolic SAR (stop and reverse) is a trend-following indicator that may help establish stop loss parameters, as well as signaling opportune times to buy or sell a stock. Because it's a trend-following indicator, it tends to be less useful in a sideways market and more useful in a strongly trending market.

A line above the price may indicate a bearish trend, and a line below the price may point to a bullish stock.

More on Studies

CHART TOOLBAR

The Chart Toolbar allows quick access to the most commonly used chart features, such as trend lines, studies, and other settings. Hover your mouse over an icon in the toolbar to see what it will do.

More on the Chart Toolbar

TRADING WINDOW

OPTION TRADING ENHANCEMENTS

- ***Dividend Yield %*** data is now automatically provided and updated in real time in the Hypothetical Pricing/Parameters in the Trade Window and the Watch List (from the right-click menu when viewing an option).

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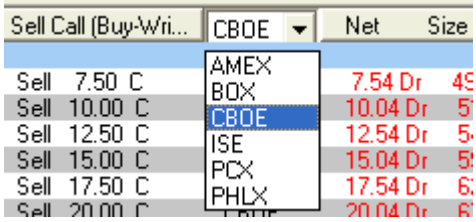
- ***Market Value*** calculation for option positions now uses the current bid or ask instead of the last trade price for greater accuracy.
- Option symbols may now be entered with the leading period (.symbol) or trailing .o (symbol.o).
- Sell-Writes are now available for order entry via the Write/Unwind tab of the Advanced Options screen in the Trading Window.
- Option traders may now place Cash Secured Equity Puts (CSEPs) in both cash and margin accounts. Cash will be withheld from buying power in the amount of 100% of the assignment value of the short put position if it cannot be paired with either a short position in the underlying stock or an existing long put position.
- Options trading in pennies (currently scheduled to begin in January 2007) will be supported. For more information on the roll-out of option trading in penny increments visit http://www.sia.com/options_markets/html/penny_pilotprogram.html.
- Dividend Reinvesting is now available in the Buy-Write order entry tab of the Advanced Options screen of the Trading Window.
- You may now view price indications from several exchanges in the Advanced Option Order window.



NASDAQ SINGLE BOOK

NASDAQ® has integrated SuperMontage, INET, and BRUT branded market data facilities into a Single Book. While the integration does not impact the existing order routing venues and order types, the migration results in Level II data display changes within StreetSmart Pro®.

The software consolidates SIZE, BRUT and INET quotes into one INET quote at each tier.

Visit the NASDAQTrader.com for more information on the NASDAQ Systems Integration.

SUPERMONTAGE PREFERENCING

As part of NASDAQ efforts to become operational as an exchange and in order to comply with exchange price/time priority rules, you may no longer preference individual Market Participants via SuperMontage. All SuperMontage orders will route as a "broadcast" order.

More on SuperMontage Order Routing

ECN NAME CHANGES

Due to ECN ownership changes, NTRD is now displayed as ONTD in your venue selection menu and Level II/ECN book display.

More on ONTD

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TRADING WINDOW SETTINGS

- In your Level I display, you may now choose whether to display ***Change from Close***, ***Change from Open***, or ***Change from Previous Close***. Select your favorite from the Trading Window General Settings window under the **L1 Data** tab.
- In the **L2 Data** tab of the Trading Window General Settings, you can check ***Remove Stale Quotes*** to filter out stuck Level II quotes during market hours.
- The new ***Sort Quotes by Size*** setting in the **L2 Data** tab, if checked, will sort all the posted quotes at each tier in Level II by Size and then Time, so the largest quote would be at the top of the tier.
- If checked, the new ***Color Watches at Inside Only*** feature of the **L2 Data** tab will highlight the watched Market Makers/ECNs only when they are at the inside bid or ask.

More on Trading Window Settings

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Logging On & Off

Starting the Software and Logging On

1. Double-click on the StreetSmart Pro® icon located on the desktop (OR go the Windows task bar, click on ***Start > Programs > Schwab > StreetSmart Pro***).
2. The main menu will open, and the Logon window will appear. (If you cancel the logon window, you can reopen it from the ***File*** menu.)
3. Type the Logon ID assigned to your account.
   NOTE: To logon to StreetSmart Pro® in either Live or Demo mode, you must have a Schwab Logon ID and Password (the same password you use for trading web site). The ID is either your Social Security number (domestic clients only) or a Customized User ID (applicable to all clients) . StreetSmart Pro® will not allow you to logon with your Schwab Account Number and Password. If you need help logging on to StreetSmart Pro® or setting up an User ID, please call your Schwab Active Trader Broker (domestic clients) or your Schwab Investment Specialist (Europe and Hong Kong customers).
4. In the Password field, enter the password you selected upon opening your account.
5. Click on ***Live Logon*** or ***Demo***. When trading in Live mode you will effect changes to your portfolio using your own capital while Demo mode allows you to become familiar with the software and practice your trading in a simulated environment. Refer to Demo Mode for more information.
6. If the log on is successful, it will prompt the default layout.

Logging Off and Exiting the Software

1. To exit the system you must go to the main menu
2. Click on ***File > Exit***
3. Click OK to close any subsequent dialog boxes that appear

OR

1. Click on the close button ✕ in the right-hand corner of the main menu.
2. The system will ask you to confirm the action.

NOTE: You will automatically be logged off if you close the Account Detail window.

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Main Menu Bar

Use the Menu Bar at the top of your window for quick access to Schwab.com links, Live Help, layouts and other software settings, and more.

MAIN MENU OPTIONS

FILE	
Logon	Click ***Logon*** to connect to your account and begin receiving data.
Logoff	Click ***Logoff*** to exit your account and disconnect from the servers.
Load Layout	Click to choose a saved layout.
Save Layout	Click to save changes to the current layout under the same layout name.
Save Layout As	Click to save the layout as a new name.
Recently Used Layouts	The last five layouts used are listed for convenient loading. Click on the name of the layout you want to see.
Exit	Click ***Exit*** to logoff and close the software.

TOOLBARS ❖ **TIP:** Click on any of the toolbars (except the Status Bar) and drag it to move it to another location in your layout. Be sure to Save your layout under the File menu if you make layout changes you wish to keep.	
Main Toolbar	Click to hide or display the main toolbar where you can access many of the tools in your software. Hover your mouse over an icon in the toolbar to see what it will open. For more information about the toolbar, visit the Toolbar topic.
Balances Bar	Select among several account statistics to display in your StreetSmart Pro® window at all times. For more information on configuring the statistics displayed, visit the Balances Bar topic below.
Chart Toolbar	Click to hide or display the Chart toolbar, which gives you quick access to chart features such as trend lines, retracements, and other chart settings. Hover your mouse over an icon in the

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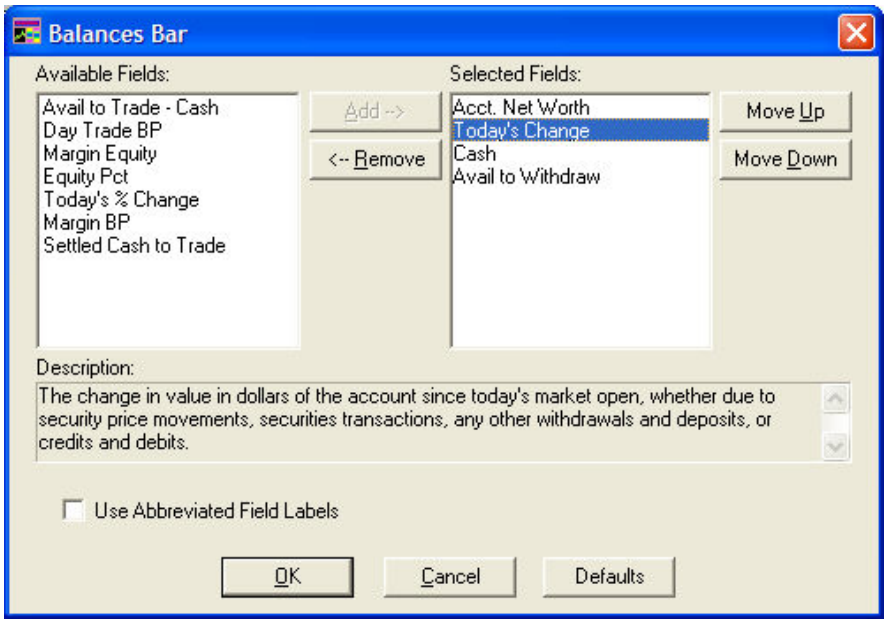
	toolbar to see what it will open. See Chart Toolbar for more information on this tool.
Status Bar	Click to hide or display the server and order routing status bar at the bottom of the software window. See Status Bar for more information.
Live Help Bar	Click to hide or display the Live Help bar, which you can click to open a chat session with a StreetSmart Pro client support representative. ! **NOTE:** It is important that you do not use the Live Help panel in StreetSmart Pro to request, authorize or effect the purchase or sale of any security or commodity, to send fund transfer instructions, or to effect any other transactions. Any such requests, orders or instructions that you send will not be accepted and will not be processed by Schwab.
Customize	The Customize menu option provides you with access to customize the information displayed in the Balances Bar, Chart Toolbar, and Status Bar. Click ***Customize***, and then select the toolbar you wish to customize, or you can right-click on the toolbar and select ***Customize...*** For Balances Bar, the following window will open:  For the Chart Toolbar, the following window will open:

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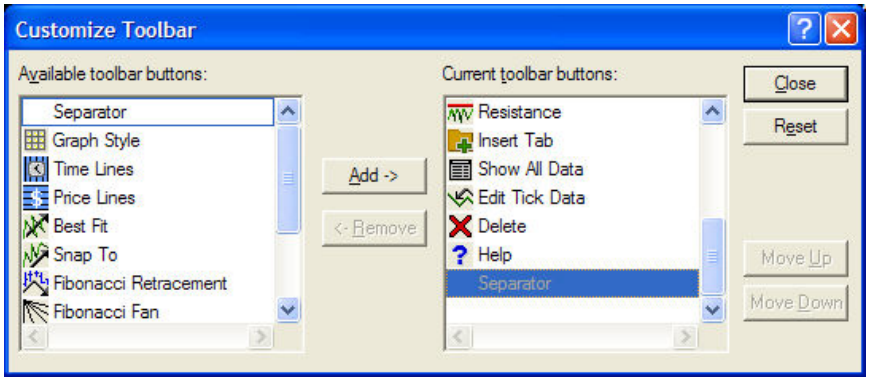
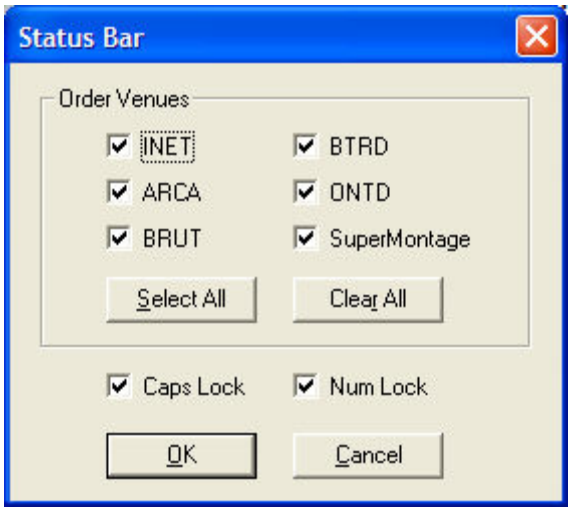


For the Status Bar, the following window will open:



Check the routing venues you wish to monitor in the Status Bar at the bottom of your window. If the route is available, it will display in green; if unavailable, red.

You may also indicate whether the Caps Lock and/or Number Lock should be permanently enabled or disabled in the software by checking/unchecking those options.

The checked boxes will then display at the bottom status bar as shown below:

SETTINGS	
GENERAL	You must log off after making changes to many of these fields for the changes to take effect.
Servers	These fields for making server adjustments should only be changed after consulting with a Schwab Active Trader Broker or Technical Support Services representative.
Free-Floating Windows	• Check to allow windows to move outside the main application frame (to view on multiple monitors, for example). • When unchecked, all windows will open within the main

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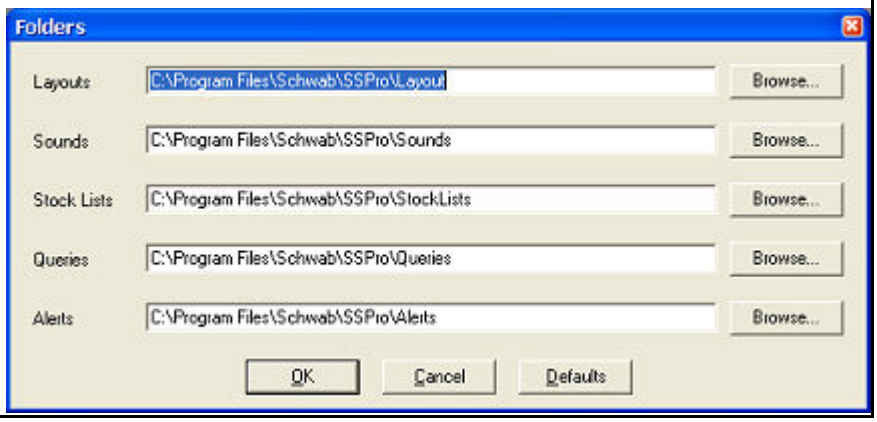
	application frame.
Auto-Save Layouts	Automatically saves the current layout of your screen when you exit. If you do not want to save your layout upon exiting, uncheck this box.
Inactivity Timeout	Customize the amount of time that you wish to remain online before the software logs you off due to inactivity. • Select a number between 1 & 8. The default setting is 1. • When you change this setting, a confirmation message will appear in the Messages window. • Logging off and then back on is not required for this setting to take effect.
Update Equities P&L in Extended Hours	When checked, allows you to choose ***Last Trade Price*** or ***Bid/Ask Price*** to calculate after hours P&L. When unchecked, P&L calculations will use the closing bid/ask to calculate P&L, so the calculation will not update after hours.
Update Rate	Increase or decrease your Update Rate. This will control the speed of the data that your CPU must process. If you have a slower processor, it may be helpful to reduce this rate. Move the pointer between ***Slow*** and ***Fast*** to control how many times per second your window refreshes.
Open Links Using:	Choose between ***Internal*** or ***External Browser***. • Controls whether web browsers launch within (internal) the cockpit or as a separate window (external). • Applies to the Education Weblink icon, right-click links to Schwab.com Research & Extended Quotes, and News links. • Logging off and then back on is not required for this setting to take effect.
Folders	The Folders settings provide a way to save certain types of files used by the software in a predictable location. Type the location or click ***Browse*** to find a location in which to save each of the following types of files, then click ***OK*** when you are finished. 

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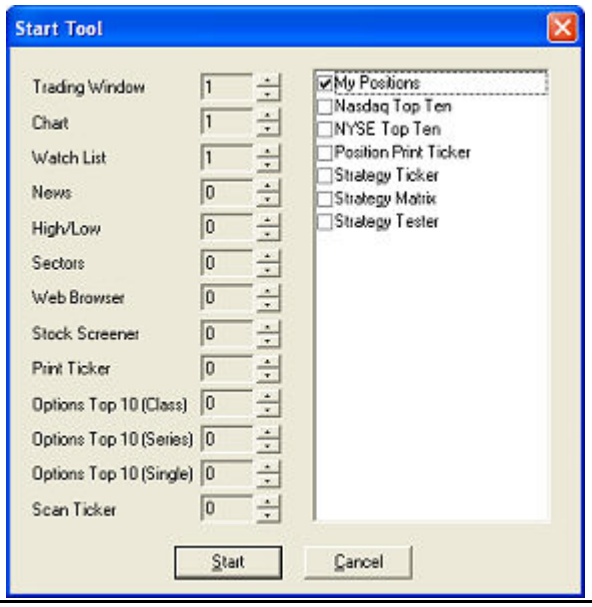
Proxy	You can change Proxy configurations if you use a Proxy server or are behind a firewall. Contact your Network Administrator for the appropriate settings.
Level II Subscription	Click to get information on subscribing to Level II Data in your StreetSmart Pro software.
Fonts	Change the font, style and size as well as the Script style of your balances that are displayed at the top of the application.
Account Nickname	You can assign a nickname to the account youre viewing by entering the nickname and clicking ***OK***.

TOOLS	
Start Tool	This feature allows you to change the windows that are open in the software. Windows listed on the right can only have one open instance; put a check next to the windows you wish to have open. 
Symbol Lookup	Use this tool to look up the name or symbol of a company. For example, if you do not know the symbol for a company, you can type in the full or partial name of the company and get back a list of companies with similar names, along with their symbols.

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	 In the main menu, click ***Tools > Look Up Symbol*** or click the icon in the toolbar. • Enter the name or as much partial information as you have and click ***Enter***. You may also check the Symbol option and simply enter a ticker symbol to get a company name. This can be done for either ***Stock*** or ***Index***. • The closest matches to what you entered will appear at the top of the list. • You can load the data directly into the Quotes Window by right-clicking the symbol and selecting ***Load [symbol] into Trading Window***. • Clicking on ***Name*** and ***Index*** will give you a list of all indices.
Find Active Tool	Restores active windows that may be hidden or minimized. Click ***Find Active Tool***, and then select the window you wish to view.

Schwab.com	
Quotes and Research	Opens a Schwab.com browser session to the Quotes & Research tab.
Ken Tower Daily Comments	Recap of the previous trading day and a technical forecast of the upcoming day.
Ken Tower Weekly Comments	In-depth review of the past trading weeks with an analysis of the market's long-term trend.
Market Edge	Access stock ratings, workshops, market commentary, and

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Ratings	much more from Market Edge.com.
Market Insight	Get insightful market and investing commentary by Schwab Center for Investment Research.
Options Street	Access Schwab.com option trading tools, including advanced options, screeners, calculators and more.
Options Street - Spread Search	Go straight to the Schwab.com option spread search tool.
Account History	Open a Schwab.com browser session to your account history.
Account Performance	View your account performance on Schwab.com.
Account Transfers and Payments	Manage and view any transfers or payments coming in or out of your Schwab.com account.
Online Seminars	Access information and schedules for online seminars through Schwab.com.
Schwab Investing Workshops	Find out when a Schwab Investing Workshop will be in your area.
Customer Service	Go directly to the Customer Service page of Schwab.com where you can get more information on transfers and payments, account services, managing your profile, and much more.
Subscribe to Level II	Click here for instructions and information on subscribing to Level II data.
Add Direct Access	If you already have a subscription to Level II data service, you may qualify for Direct Access trading, which allows you to target and send orders directly to ECNs and NASDAQ Market Makers. Select this menu item to get more information on Direct Access trading.
Disclosures/ Agreements	View the user agreements that may be associated with your account. If you have questions about which agreements apply to your account, contact your Schwab Active Trader representative.
At A Glance	Get an overview of basic balance information for your account(s) on Schwab.com.
My Benefits	See what services, tools, and products are available to you based on the type of account you hold with Schwab.
StreetSmart Pro	Access the StreetSmart Pro section of Schwab.com where you can learn more about the product, download the latest version, access online seminars, and more.

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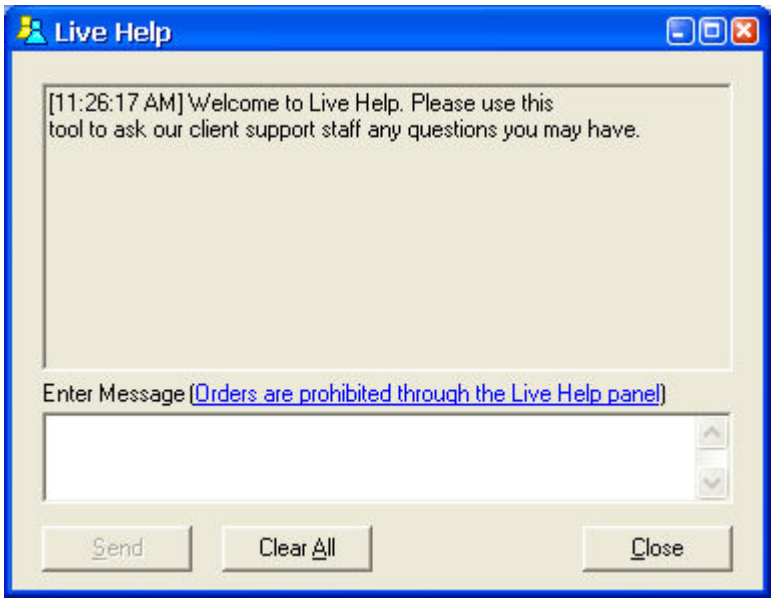
HELP	
Live Help	The Live Help window allows you to communicate directly with a Schwab Active Trader Representative without having to pick up the phone. Just open the Live Help window, type your question, and the representative will respond in real time.  **Sending Messages:** 1. In the Main Menu, click ***Help > Live Help*** or click the icon in the toolbar 2. Type in the message under **Enter Message** 3. Click ***Send*** 4. To clear previous messages, click ***Clear***. 5. Click ***Exit*** to close down the box. **NOTE:** It is important that you do not use the Live Help window in the Schwab® trading platforms to request, authorize or effect the purchase or sale of any security or commodity, to send fund transfer instructions, or to effect any other transactions. Any such requests, orders, or instructions that you send will not be accepted and will not be processed.
Reconnect to Servers	If the Status Bar indicates you have been disconnected from the server (one of the two indicator lights would be red) and automatic reconnection was not successful, click ***Reconnect to Servers***. If the problem persists, log off and try logging on again. Contact your Schwab Active Trader team if you are still unable to connect.
Online Help	Click to open the online help files.
Layout Assistant	The Layout Assistant helps you identify the right layout for your style of trading. Click through the tabs at the top of the window

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	and move your mouse around the screen to see a description of each window highlighted on the right. Once you have found a layout you wish to use (you can continue to customize the layout once you have selected it), click ***Select This Layout***.
New Features	Click to read about the new features of the version you are using.
About StreetSmart Pro	Click for copyright and version information for your software.

❖ TIPS:

Auto Save Layouts

All layouts have been set to auto-save so that any modifications you make to a layout will be automatically saved when you log out of the software.

To disable this feature, go to ***Settings > General*** and uncheck ***Auto Save Layouts***.

StreetSmart Pro Timeout Feature

StreetSmart Pro software is designed to automatically log out after a specified period of time of inactivity.

- To change this setting from the default of 1 hour, go to application main menu and click on ***Settings > General***.
- If your session is timed out or you lose connection, simply **Logon** again.

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Demo Mode

Familiarize yourself with all the features in StreetSmart Pro® without risking any capital by logging on in Demo mode.

To access, choose ***Demo*** instead of Live when logging on.

Demo mode allows you to:

- Get familiar with all aspects of the software: indicators, chart, confirmation messages, settings, etc.
- Practice entering orders quickly, including changing share size, price, and execution venue.
- Observe the Level II information, the movement of Market Makers and ECNs.
- Correlate price movements on a stock with market or sector movements.
- Learn what momentum may look like in the Level II screen.
- Observe the different types of stocks and different ways of trading based on spreads, volume, velocity, and momentum.
- Observe chart pattern formation.

! NOTE: You should **not** determine the success rate of a trading strategy based on demo mode or simulator performance. Orders placed in Demo mode are filled randomly, with no regard to price, so the fill rates have no resemblance to those you might experience in Live mode. Only use demo mode for learning the mechanics of the software.

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Customizing Your Desktop

CUSTOMIZING YOUR DESKTOP

Window Layouts

You can design and modify your window layout as often as you like. The window layout that appears when you log on is a default layout. You can:

- Keep the default layout.
- Change it to one of the alternative built-in layouts.
- Build your own layout by opening, closing, resizing and moving the windows. Remember to save your layout, click ***File > Save Layout As...***

To open a built-in Layout or one of your customized layouts:

- Go to the Main Menu and click ***File***.
- Click ***Load Layout***, then click on the layout of your choice.

Window Tabs

You can further customize the layout by adding Tabs to following windows:

- Watch Lists
- Charts
- Top 10
- High/Low

See Adding Tabs to Windows for instructions on inserting, editing, or deleting tabs in the windows that support them.

Toolbars

In the ***Toolbars*** menu, select which toolbars you wish to display. You can click and drag each toolbar to relocate it anywhere in your software window. When placed around the edge of the window, it will snap to the perimeter of the window, or it can be free-floating in the layout.

ADDING TABS TO WINDOWS

Tabs allow you to maximize screen space while still having quick access to multiple Chart, Watch List, and other tab-enabled windows. When tabs are enabled, your window will look something like this:

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Windows that have the tab functionality will have a ***Tab*** menu in their menu bar. To access the menu bar, right-click in the window and select ***Show Menu***. The following options will be available:

Enable	When checked, allows you to maximize screen space while still having quick access to several windows within one window. When unchecked, you must open several independent windows to view multiple Charts/Watch Lists/etc.
Insert	Select to add a new tab to the window.
Edit [tab name]	• Select to edit the current tab's settings, including the name and location. • You can also edit a tab name by double-clicking on the tab and entering the new tab name.
Delete [tab name]	Select to delete the current tab from the window.
***Use same symbol for all tabs**	When checked, loading a symbol into one of the chart's tabs will also load the symbol on every tab in that chart window.

***This option is only available in the Chart Tabs menu.*

To enable Tabs:

1. Click ***Tabs > Enable*** in the window menu.

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2. To create tabs, click ***Insert***. The Insert Tab window will open as shown below.

3. Enter a name for the tab and specify its location in relation to existing tabs in the window using the **Insert**, ***Before***/***After***, ***[tab name]*** fields.
4. You can use another tab as the basis for your new tab by selecting the other tab from the ***Copy settings from*** drop-down. Select ***<Default settings>*** to create your tab with default settings.
5. Click ***OK***, and the tab will display in the Tab window. To change the name later, you need only right-click on the tab label and select ***Edit***. Then, enter a new name. To remove a tab, click on the tab label and select ***Remove***.
6. ***Use same symbol for all tabs*** **[Chart Window Only]**: Select this menu item (so that it is checked) if you want every tab to load the same symbol when you change the symbol in one tab. For instance, if you have this checked and you enter ABCD into one of the tabs in the window and press ***Enter***, ALL tabs in that chart window will load ABCD.

❖ **TIP:** You may establish different tabs for each new window you open. The tabs and other changes to your windows are saved when you save your layout.

ADDING WINDOWS

Windows can be added by either:

- Clicking on the appropriate toolbar icon or,
- Using the **Start Tool** window located in the main menu bar. Go to ***Tools > Start Tool***.

CLOSE UNUSED WINDOWS

You can hide/delete windows in your layout permanently or temporarily.

To Permanently Close a Window:

1. Click on ✕ in the window you want to close.
2. Save the new layout with the closed window. Go to Saving Layouts for more information.

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To Temporarily Close a Window:

1. Click the Minimize button in the top right corner of the window.
2. The window will be minimized and put at the bottom of the window above the Task Bar.

To Reopen a Window:

- Go to ***Tools > Find Active Tool*** in the Main Menu bar and click on the window you want to open.

SAVING LAYOUTS

StreetSmart Pro® software remembers the last layout you used and displays it when you logon. However, it's best to save your preferred layouts after customizing. There are two simple ways to save your layouts:

Save Layout Under Same Name

1. Go to the Main Menu Bar and click ***File***.
2. Click ***Save Layout*** under the current layout name.

or

Save Layout Under New Name

1. Go to the Main Menu Bar and click ***File***.
2. Click ***Save Layout As***.
3. Enter a name for the **Layout** at the bottom of the **Save** window, for example, *Layout 4*.
4. Click ***Save***.

❖ **TIP:**

When You Save a Layout

You cannot save over a built-in layout as they are read-only files. However, you can save your changes to a built-in layout by following the **Save Layout Under New Name** directions above.

Backup Layouts

Each day when you log on, a backup of your layout is saved on your computer, so that if your layout becomes corrupted or you save changes to it that you wish to reverse, you don't have to start from scratch. The application will store backup files for the last 3 days that you logged into the application. The backup files are saved in a folder called Backup Layout (in your Layout folder) and have the same name as the original layout with the date of the backup appended to the name (for example, "10202006Options.lyt").

If the software detects an irregular or invalid exit from your previous session, it will ask you if you want to open the last good saved layout. Selecting ***Yes*** will prompt you to save the backup layout to your regular layout folder before proceeding.

You can also restore a layout from a backup by going to File > Load Layout and navigating to the Backup folder.

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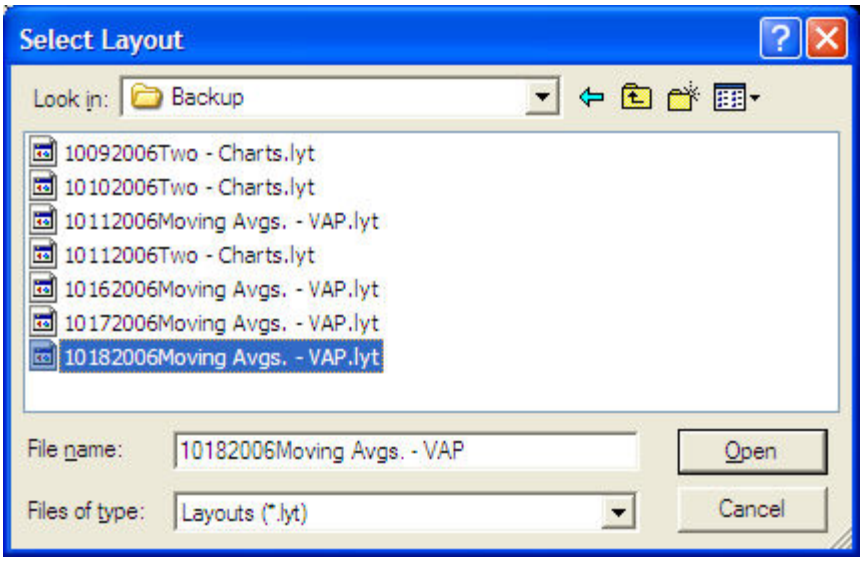

Open the layout you want to restore and you will be prompted to save it to your regular Layouts folder.

SHRINK OR ENLARGE WINDOWS

Each window in the software can be resized to allow for additional windows or to accommodate the size of your monitor.

To Resize the Width/Height of a Window

1. Place the mouse pointer on a side of the window until an up/down or left/right arrow appears.
2. Left-click and hold the mouse button while resizing the window, then release the mouse button.

To Resize the Entire Window

1. Place the mouse pointer on the corner of the window until the diagonal arrow appears.
2. Left-click and hold the mouse button while resizing the window, then release the mouse button.

MOVE WINDOWS

StreetSmart Pro® windows can be arranged any way you like within the frame of the software.

To Move Windows:

1. Click and hold your mouse pointer on the top bar of the window and drag to the new location.
2. Let go of the button when the window is where you want it.

or

1. Right-click on the top bar of the window.

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2. Click ***Move*** and an expansion arrow (a plus sign with arrows at each end) will appear.
3. Use the ***Up***, ***Down***, ***Right***, ***Left*** arrows on your keyboard to position the window.
4. Left-click the mouse button to ground the window.

CREATE FREE-FLOATING WINDOWS

Your StreetSmart Pro® windows can also be dragged anywhere on your desktop outside the frame of the software (when you want spread the data across multiple monitors, for example).

To Enable/Disable Free-Floating Windows:

1. Log off, but do not exit the software (click ***File > Logoff*** in the Main Menu bar).
2. In the Main Menu, click ***Settings > General***.
3. To choose an unframed layout – allowing you to move windows outside the frame, check ***Free Floating Windows*** in the Settings window or,
4. To choose a framed layout - framing all windows in one large window - uncheck ***Free-Floating Windows*** in the Settings window.

You must restart the software for the changes to take effect.

CHANGING BACKGROUND & FONT COLORS

StreetSmart Pro® software allows you to change the background and font colors in most windows.

To Change Colors:

1. Go to the Main Menu of the window you want to change.
2. Click ***Settings > Colors***. One of three Color Selector windows will open:

Figure 1 - Click on the color wheels to modify colors.

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Figure 2 - Controls Charts. Highlight the area you want to change and click the color wheel to assign a color.

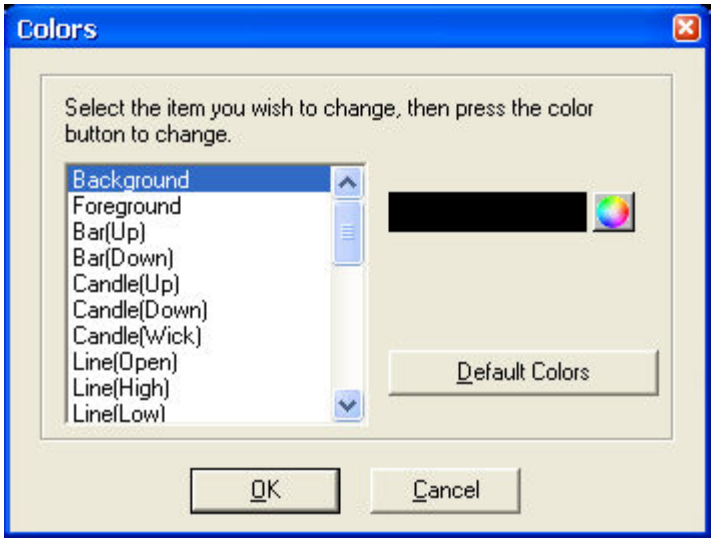

Figure 3 - Controls the Trading Window. The lower area gives you several color options for Level II, for which you can choose one of the built-in color schemes, or you can choose ***Custom*** and create your own color for each individual level.

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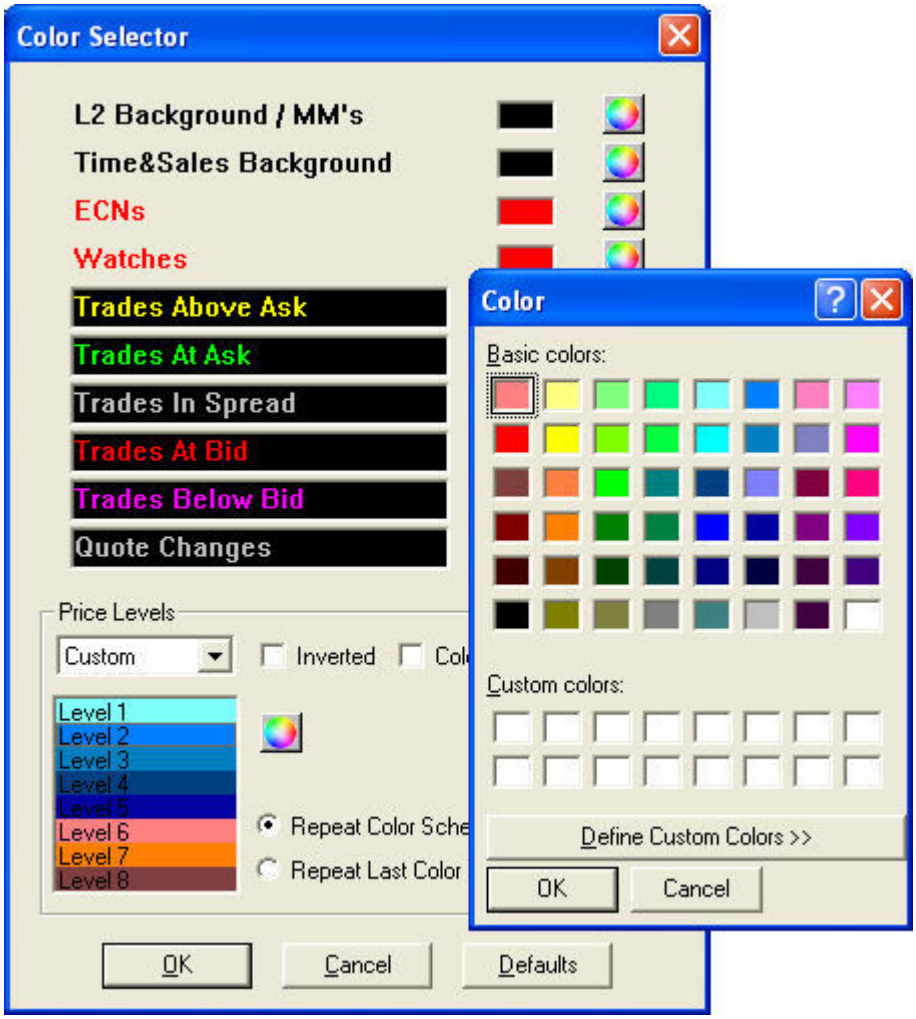

Change Fonts

The software allows you to change the font for each window. The default font is MS Sans Serif, Regular.

To Change the Font

1. Click ***Settings > Fonts*** in the Menu Bar of the window you want to change.
2. Make your changes and click ***OK***.

❖ **TIP:**

Bold Fonts

Using bold fonts may make some of the windows easier to read.

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BUILT-IN LAYOUTS

StreetSmart Pro® software comes with several built-in layouts. To maximize all available screen space and fit the size and resolution of your computer screen, it may be necessary to select an alternative StreetSmart Pro built-in layout.

The default layout, the layout you see when you first log on, is designed for a screen resolution of 1024x768. If your screen resolution is set lower than 1024x768, the windows in the layout may be too big to fit your screen. To correct the problem, go to ***File*** and select ***Default (800x600)*** from the list of layouts located at the bottom of the drop-down menu.

There are other layouts which use different features of the StreetSmart Pro application. All layouts are provided to give you ideas for customizing your own layout. You can start from scratch or use one of the layouts provided as a starting point for your own custom design.

To access all of the available pre-loaded layouts go to ***File > Load Layout*** in the main menu.

You may also use the ***Layout Assistant*** tool in the ***Help*** menu. It will show you the features of each layout and allow you to choose the best starting layout for your style of trading.

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Configuration & Troubleshooting

CONFIGURING THE SYSTEM

To Change General Software Settings:

Go to the Main Menu and choose ***Settings > General***. Change any of the following settings in the General Settings panel:

- Make server adjustments. ! **NOTE:** Server adjustments should be made only after consulting with a Schwab Active Trader Broker or Technical Support Services Representative.
- Change to/from a free-floating windows layout.
- Auto-save your layouts.
- Increase your timeout setting from 1 to 8 hours. ! **NOTE:** If you leave your computer logged on overnight there are some circumstances where you may find that you are still logged on the following morning. If this happens, you must log off and log back on before placing any trades.
- Choose to use an internal or external browser.
- Increase or decrease your Update Rate. This will control the speed of the data that your CPU must process. If you have a slower processor, it may be helpful to reduce this rate.

SYSTEM REQUIREMENTS

To effectively run StreetSmart Pro®, your computer must meet these minimum requirements:

- Windows® 2000 or the Windows XP operating system. This application is NOT available for Macintosh or Linux operating systems.
- All versions should be run in conjunction with Microsoft Internet Explorer 6.0 or higher due to encryption requirements. You can experience logon issues if you do not have IE 5.5 or higher. Netscape and other browsers are not recommended.
- Pentium® III type processor 500MHz or greater
- 40 MB of available hard drive space
- 128MB of RAM
- 56K modem (minimum) -- a Cable Modem, DSL, ISDN line or other broadband service is recommended
- Internet connection through an Internet Service Provider (ISP)
- We suggest using at least a 17" monitor when using the software with one monitor.
- Due to the large number of windows and layouts offered in the software (See Customizing Your Desktop), you may want to use more than one monitor to display data.

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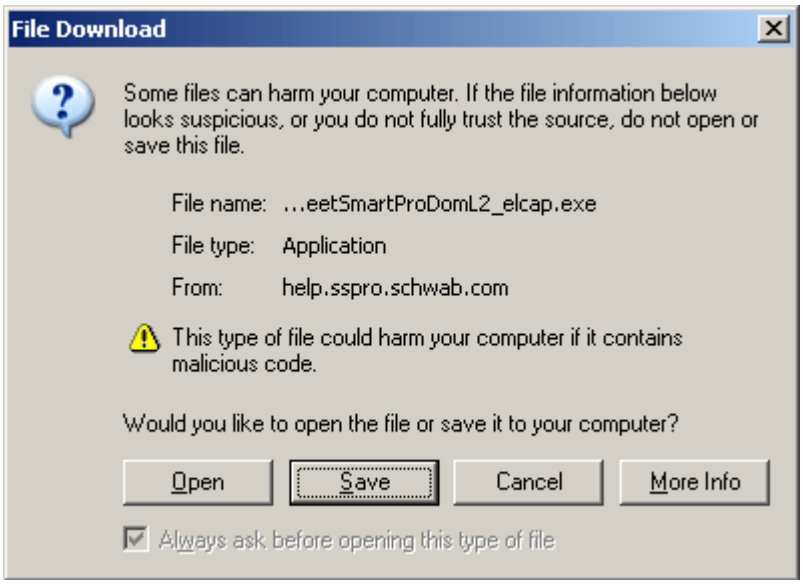
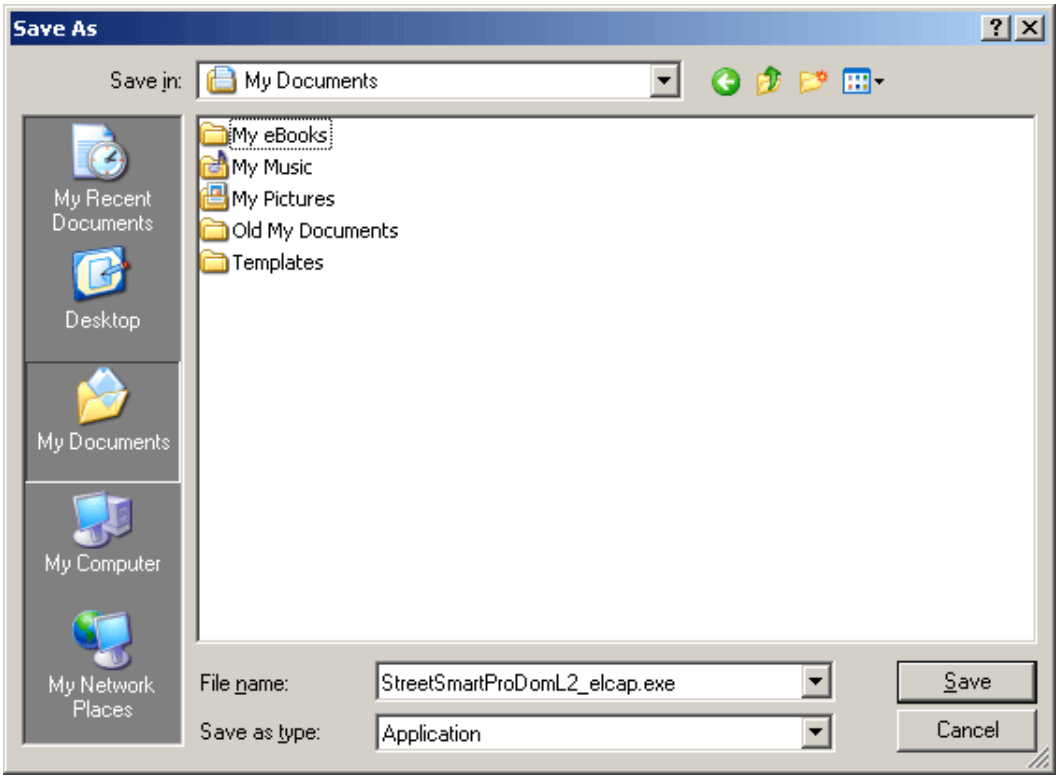
DOWNLOADING THE SOFTWARE

Qualified Schwab Active Trader clients can download the StreetSmart Pro® software from the download website. (Check the site for qualifications.)

1. When you start the download process, you will be prompted to save or open the file. Choose ***Save***.


File Download
Some files can harm your computer. If the file information below looks suspicious, or you do not fully trust the source, do not open or save this file.
File name: ...eetSmartProDomL2_elcap.exe
File type: Application
From: help.sspro.schwab.com
This type of file could harm your computer if it contains malicious code.
Would you like to open the file or save it to your computer?
Open
Save
Cancel
More Info
Always ask before opening this type of file

2. Select the location where you want to save the downloaded file and click ***Save***.



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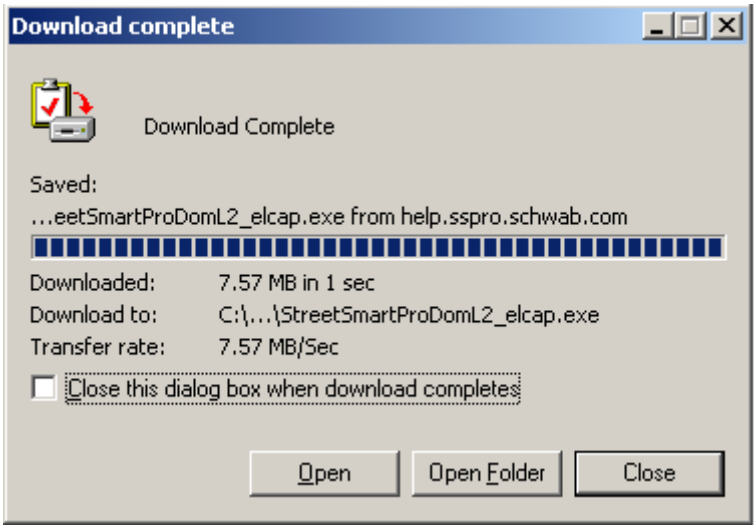
3. The status of your download is displayed and when it is finished, click ***Open*** to run the installation program.



INSTALLING THE SOFTWARE

Before you install StreetSmart Pro®, be sure you *close all other applications*. The installation process will start as soon as you accept the End User License Agreement and the StreetSmart Pro Agreement. Click here for more information about your agreements with Schwab.

- The set-up program will automatically install StreetSmart Pro into a new file folder (the default location is *C:/Program Files/Schwab/SSPro*) unless you indicate otherwise.

  ! **NOTE:** We highly recommend that you install the program on the default location, so that it will replace any previous versions of StreetSmart Pro that may already exist on your hard drive. If you do not over-write previous versions, you may experience problems.

- When installation is complete, you will be prompted to restart your computer to complete the installation process. After restarting, you will see the StreetSmart Pro icon on your desktop.
- Click the icon to launch StreetSmart Pro on your computer.

SERVER CONNECTION STATUS

Auto-Reconnect

The auto-reconnect feature is part of all modules within the software. When a window/module is disconnected from its server, the system immediately recognizes the fault and tries to reconnect. If you find it necessary to manually reconnect, click on ***Help > Reconnect to Servers*** and wait a moment for the reconnection to transpire.

Connection Status Display

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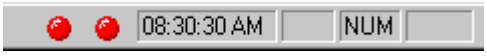
In the Status Bar at the bottom of your software window, two green lights indicate the flow of data to your computer from the servers. The first one indicates the status of your connection to the Account Server and the second indicates status of the chart, Level II, and other data. They will turn red if you lose your connection to either the data servers or the account servers.

Shows fully logged on and functional.



Shows logged off with no data coming in.

❖ **TIP:** To display the Status Bar, click ***Toolbars > Status Bar*** in the main menu.

Routing Connection Status

You can also display the connection status of certain routing venues in the Status Bar. Click ***Toolbars > Customize > Status Bar*** in the main menu and check the routes for which you wish to see connection status.

You may also indicate whether the **Caps Lock** and/or **Number Lock** should be permanently enabled or disabled in the software by checking/unchecking those options.

PROXY SETTINGS

In the ***Settings > Proxy*** menu, you can change proxy configurations if you're running your software on a proxy server or behind a firewall.

Go to the Main Menu Bar, choose ***Settings > Proxy*** and enter your changes in the Proxy Settings panel.

❗ **NOTE:** StreetSmart Pro® supports logon via an HTTP Proxy only. Be sure to contact your system/network administrator for the appropriate proxy settings.

SOFTWARE UPDATES

As new upgrades and enhancements become available, you will receive an announcement starting the first time you **Logoff** after the upgrade or enhancement is available. You can choose to automatically load the upgrade or postpone loading it. The update announcement window will continue to appear at each **Logoff** until it has been loaded onto your computer.

❗ **NOTE:** It is recommended to accept upgrades and enhancements as they become available to you for the best user experience.

TROUBLESHOOTING GUIDE

Start with this ISP (Internet Service Provider) checklist:

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- Is your modem functioning correctly? Check by trying to connect to the Internet with another application.
- Is your telephone/data/cable line connected to your PC?
- Have you dialed into your ISP and established a connection?

PROBLEM	POSSIBLE SOLUTION
Cannot Connect **Error Message**	• Complete the ISP checklist above. • If you're using behind a firewall or proxy server environment (which are common in the workplace), contact your Network Administrator and go to the Menu Bar and choose ***Settings > General*** to correctly configure the software.
Invalid Password or ID	StreetSmart Pro requires a Schwab logon ID (Social Security Number or self-selected User ID) and password not your Schwab account number and password. Contact your Schwab Active Trader Broker if you need assistance setting up your logon ID.
Disconnected from Data Servers **Data Is Not Updating**	• If you lose your connection, the software will automatically try to reconnect any lost connections. • If the automatic reconnection was not successful, go to the Main Menu Bar, click ***Help > Reconnect to Servers.*** • If the problem persists, log off (***File > Logoff***) then log back on (***File > Logon***). Contact your Schwab Active Trader Broker if you are still unable to connect. • Complete the ISP checklist above.
Charts Not Printing Clearly	Try changing the background color to white for a clearer image.

LIVE HELP

The Live Help window allows you to communicate directly with a Schwab Active Trader Representative without having to pick up the phone. Just open the Live Help window, type your question, and the representative will respond in real time.

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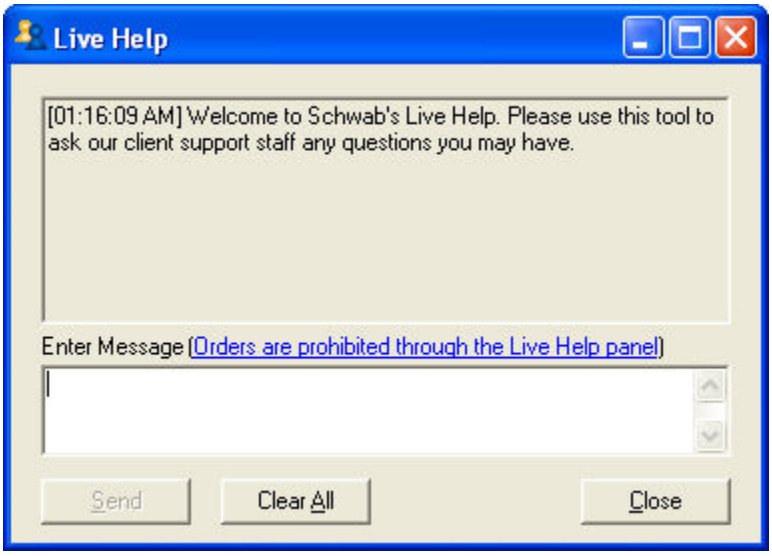
Live Help
[01:16:09 AM] Welcome to Schwab's Live Help. Please use this tool to ask our client support staff any questions you may have.
Enter Message (Orders are prohibited through the Live Help panel)
Send
Clear All
Close

Sending Messages:

1. In the Main Menu, click ***Help > Live Help*** or click the icon in the toolbar
2. Type in the message under **Enter Message**
3. Click ***Send***
4. To clear previous messages, click ***Clear***.
5. Click ***Exit*** to close down the box.

NOTE: It is important that you do not use the Live Help window in the Schwab® trading platforms to request, authorize or effect the purchase or sale of any security or commodity, to send fund transfer instructions, or to effect any other transactions. Any such requests, orders, or instructions that you send will not be accepted and will not be processed.

PRINTING WINDOWS

Printing is available in most StreetSmart Pro® windows, including the ability to customize your printouts with headers, footers, grid lines, and more.

Customizing Window Printing

In windows with the Print feature, click ***File > Page Setup*** to begin customizing your print job.

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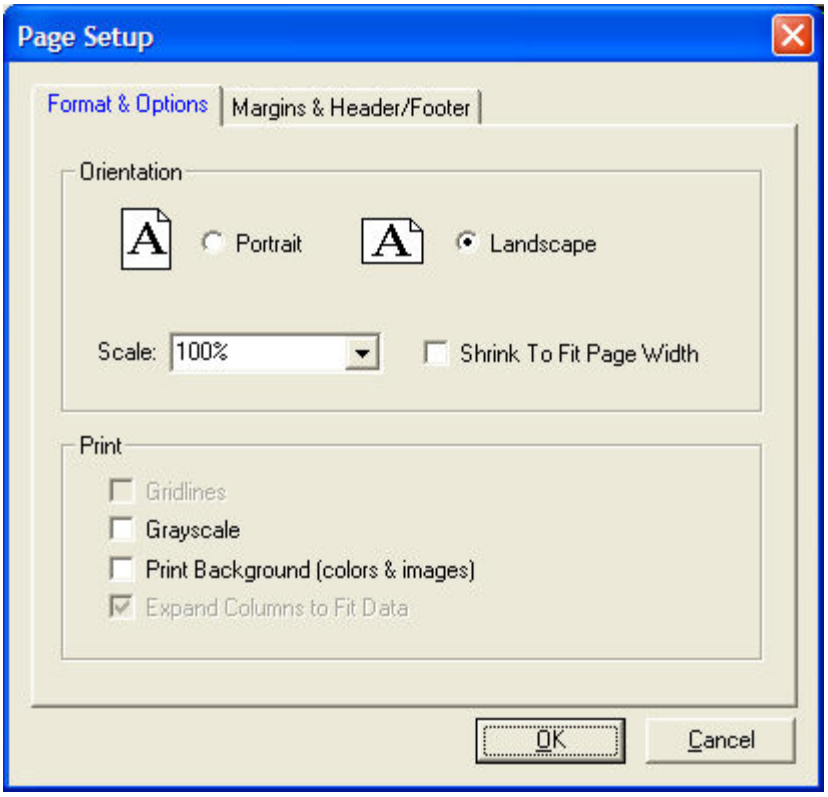

1. Select a ***Portrait*** or ***Landscape*** orientation. For wider windows, like charts, Watch Lists, etc., landscape may be the better choice to fit all the content on one page width.

   ❖ **TIP:** If the window contents still do not fit on the page, you may choose to ***Scale*** the printing to a lower percentage or click ***Shrink To Fit Page Width*** for the printer to automatically scale the page to fit.

   ❖ **TIP:** You can also go to ***Settings > Fonts*** for the window you are printing and enlarge or reduce the font size to change how the window prints.

2. Next, set up the qualities of your print job (only applicable choices will be available):
   - **Gridlines:** For windows where information is presented in a table format, check this box to keep the lines visible in the printout.
   - **Greyscale:** Check to print in shades of grey/black/white. **Note** that for some printers, you will have to change this setting in your printer properties for it to take effect. In the ***File > Print*** window, select ***Properties*** and find the setting for ***Greyscale*** and select it. The location of this setting will vary depending on the printer you use.
   - **Print Background (colors & images):** If checked, the printout will look exactly like what you have on the screen. So if you print a chart with a black background, it will print with a black background. If unchecked, it would print with a white background and white text would print black.
   - **Expand Columns to Fit:** If checked, printouts involving columns of data, such as Watch Lists, will print with the full heading of the

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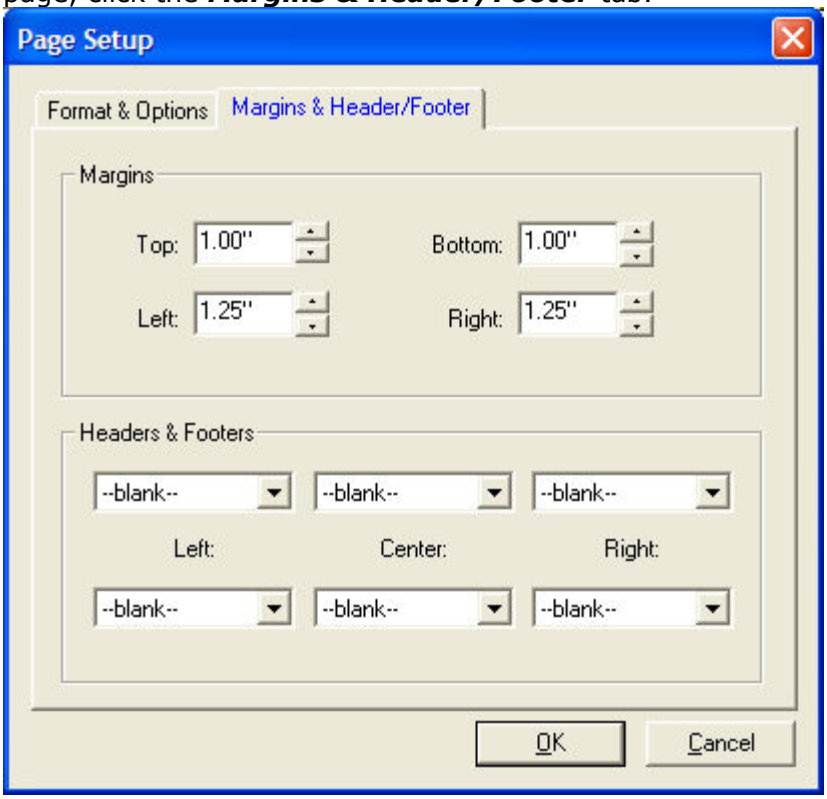
column showing.
If unchecked, the columns will be the same width as they are on the screen and column names may be partially hidden.

3. To adjust the Margins and the Header and Footer content of the printed page, click the ***Margins & Header/Footer*** tab.



4. Decreasing the size of the **Margins** may help fit more data onto a page without having to shrink the size of the data, thus keeping it more readable. Use the up/down arrows to adjust the margin size on each edge of the page.
5. If you wish to apply Header and/or Footer data to your page, select the data you wish to display from the drop-down lists in the Headers & Footers panel. The items you choose in the top row will be at the top of the page in the Left/Center/Right positions, and the bottom row selections will appear at the bottom of the page.

   Choose either the provided fields, such as Tab Name, Date & Time, Account Number, etc. or choose ***Custom...*** and enter your own header or footer content.

When you are finished customizing your print job, go to ***File > Print*** and click ***OK*** when you are ready to send the page(s) to the printer.

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Quick Reference

QUICK START GUIDE

Now you can stay plugged into the fast-changing market with StreetSmart Pro® - Schwab's leading-edge suite of real-time streaming market data software and advanced trading features for your desktop.

It's easy to get started:

- Check the system requirements and be sure your system can meet them.
- Since you need an Internet Service Provider (ISP) to run the software, connect to your ISP before you begin.
- If you have trouble installing the software, call your Schwab Active Trader Broker.
- Read through the Quick Reference topics below to learn about each tool in your software.

QUICK REFERENCE: WINDOWS & LAYOUTS

Minimize StreetSmart Pro® Frame	• Click in the top right corner of the frame to minimize all windows (unless you have chosen Free-Floating Windows). • To restore the frame, click the StreetSmart Pro icon on your desktop Task Bar.
Use the Window Scroll Bars	• Click in the window that contains the data you want to scroll through and the scroll bar will appear. • You can scroll vertically in any active window using the ***Page Up*** and ***Page Down*** buttons on your keyboard. • To scroll down the Level II quotes or Time & Sales screens, right-click in the frame you want to see and select ***Show Scroll Bar***.
Make a Window Active	Click on any window you want to make your active window.
Find the Name of a Window	The name of each window appears on the top bar. Stock names and/or ticker symbols also appear at the top of the Trading, News, and Chart windows.
Maximize, Minimize or Close Windows	Each window has three small boxes in the right corner of the top bar: • The first box minimizes the window. • The middle box expands the window to fit the screen for a better view. • The third box closes the window. Closed windows can be re-opened with the Toolbar. **NOTE:** Closing your Account Detail window will log you off the software.

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Resize Windows	• Move your cursor to the edge of the window you want to resize. • When your cursor changes to an arrow, hold down the left mouse button and drag the edge of the window until the window is the desired size.
Find Minimized Windows	• Minimized windows can be found at the bottom of the frame above the Status Bar. • To re-open a window, either double click on the minimized window or click ***Tools > Find Active Tool***, then click on the window name you want to maximize.
Open Closed or Additional Windows	• **Toolbar:** Get a quick description of each icon in the Toolbar by moving your mouse over it. When you pause on an icon, a Tool Tip will pop up. The Toolbar topic provides more information on each tool and how many of each window can be open at any one time. • **Start Tools:** Click ***Tools > Start Tools*** in the main menu bar to open the Start Tools menu, where you can add or reopen windows in the layout.
Display or Hide Menu Bars	Each window has a Menu Bar. Display or hide Menu Bars by right-clicking in the window and clicking ***Hide/Show Menu***.
<Tool> Help	Each window has a context sensitive help available from the right-click menu. Access the Online Help for a particular tool by right-clicking in the window and clicking ***<Tool> Help***.
Save Layouts	Save your layouts by going to the Main Menu Bar and selecting ***File > Save Layout As***. Then, save each layout by name.

QUICK REFERENCE: TRADING

StreetSmart Pro® Trading Window	• Enter your order in the Order Entry panel in the Trading window. • If the Order Entry panel in the Trading window has been minimized, simply click the Open/Close Order Entry Panel arrow (under "Last" quotes).
Turning on and off Level II and ECN quotes	Click on ***Settings > Data Source*** in the Trading Window menu and choose which level of quotes you wish to view. If you are trying to view Level II information and the checkbox is grayed out, please contact your Schwab Active Trader Team. Access to Level II data requires meeting certain eligibility requirements based upon trading frequency.

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QUICK REFERENCE: CHARTS

Load a Symbol	• Type the symbol in the Chart window and press ***Enter***. or • Link to the Trading window by going to the Trading window Menu Bar and clicking ***Settings > Links***. Highlight the chart you wish to link to the Trading window.
Change Chart Type & Range/Interval	Click ***Settings > General***, click on the Chart Type or Chart Interval icons on the Chart Toolbar, or right-click the Chart window. From the right-click menu, select a new ***Chart Type*** or ***Chart Range***.
Improve Print Quality of Chart	Try changing the background color of the chart to white before printing.

QUICK REFERENCE: WATCH LISTS

Add or Remove Symbols	• Right-click in the Watch List window and click ***Add Symbol*** or ***Remove Symbol***. • To add or remove symbols, you can also use your ***Insert*** or ***Delete*** keys.
Search for News on a Symbol	Right-click on the symbol in the Watch List window and click ***Recent Stories for [symbol]***.
Load a Symbol into the Trading Window	Right-click on the symbol in the Watch List window and click ***Load [Symbol] into Trading Window***.
Change Data You Want to Track	• Right-click on the Watch List column heading and select a different set of data for that column. • Alternatively, go to ***Settings > Columns***, choose the column number you want to update and the new field name, and click ***OK***.
Save New Watch Lists / **Open Old Watch Lists**	Go to the Watch List Menu Bar and click ***File > Save Watch List As*** or ***File > Load Watch List***.
Sort Data	See Sort Watch List Data and Set Up Watch List Columns topics.

QUICK REFERENCE: TOP TEN

Open the Top Ten Windows	• Click on the Top Ten icon in the toolbar. • If neither window is open (NASDAQ or NYSE), clicking on the toolbar icon will launch both

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	windows. • If one window is open, clicking on the toolbar icon will launch the window that is not open. **Or:** • Go to ***Tools > Start Tools***. • Put a check next to the window, either ***NASDAQ Top Ten***, ***NYSE Top Ten***, or both. • Click ***Start*** • The Top Ten windows will automatically appear on your cockpit.
Change Data You Want to Track	Go to the Top Ten Menu Bar and click on ***Settings > General***.
Load a Symbol into the Trading Window	Right-click on the symbol in the Top Ten window and click ***Load [Symbol] into Trading Window***.
Search for News on a Symbol	Right-click on the symbol in the Top Ten window and click ***Recent Stories for [symbol]***.
Research or get an Extended Quote for a symbol in the Top Ten	Right-click on the symbol in the Top Ten window and click ***Research/Ext. Quote***.

QUICK REFERENCE: HIGHS & LOWS

Open the Highs & Lows Windows	• Click on the Highs & Lows icon in the toolbar. • The Highs & Lows window will automatically appear on your screen. **Or:** • Go to ***Tools > Start Tools***. • Increase the number next to ***High/Low*** to 1 or more. • Click ***Start*** • The High/Low window will automatically appear on your screen.
Change Data You Want to Track	Go to the Highs & Lows Menu Bar and click on ***Settings > General***.
Load a Symbol into the Trading Window	Right-click on the symbol in the Highs & Lows window and click ***Load [Symbol] into Trading Window***.
Search for News on a Symbol	Right-click on the symbol in the Highs & Lows window and click ***Recent Stories for [symbol]***.
Research or get	Right-click on the symbol in the Highs & Lows window

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an Extended Quote for a symbol in the Highs & Lows	and click ***Research/Ext. Quote***.

QUICK REFERENCE: PRINT TICKER

Open the Print Ticker Window	• Go to ***Tools > Start Tools*** • Click on ***Print Ticker*** • Click ***Start*** • The Print Ticker will open within your software.
Load a Stock List	• Go to ***File > Load Stock List*** and select a list of stocks to load. • Or go to ***Settings > Symbol List*** to create a new list.

QUICK REFERENCE: SECTORS

Open the Sectors Window	• Go to ***Tools > Start Tools*** • Click on ***Sectors*** • Click ***Start*** • The Sectors window will open within your software. or • Click on the Sectors icon in the Toolbar
Change Indices	• Go to ***Settings > Indices*** • Check the index fields you wish to display at the top of the Sectors window. See the Index Symbol List topic for a list of available indices.

QUICK REFERENCE: NEWS

Search for News on a Stock or Index	1. Enter a symbol into the **Symbol/Code** field. 2. Press ***Enter***.

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Open News Article in a New Window	• Right-click on the News window headlines and click ***Open Story***. OR • Double-click on story headline.
Hide the News Window Menu	Right-click on the News window headlines and click ***Hide Menu***.
Read the News Article in the Preview Panel	• From the menu, select ***View > Preview***. • Right-click and select ***Show Preview Window*** • Left-click on the News headline to display the news article you want to read in the Preview panel.
Search the Article for Specific Topics	Right-click in an article and click ***Search***.
Print a News Story	Right-click in an article and click ***Print*** or ***File > Print*** from the News window.
Load a Stock into the Trading Window from a News Article	Every stock symbol in a news article is hyperlinked to the Trading Window. Simply click the symbol you want, and it will automatically load into the Trading Window.
Get More News About a Stock in a News Article	Right-click on the symbol to query for other news articles on that stock/Index.
Automatically Query for News on a Stock or Index	You can link the News window to the Trading window by going to the Trading window menu and choosing ***Settings > Links***.

QUICK REFERENCE: MESSAGES

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Messages Window	StreetSmart Pro® displays streaming order status in the Messages window for the current day only (messages from sessions earlier in the day are differentiated by their dark grey color). Check Messages for the status of your orders and their execution, as well as information about alerts and the market in general.

QUICK REFERENCE: STOCK SCREENER

Open the Stock Screener Window	• Click the Stock Screener icon in the toolbar or ***Tools > Start Tool*** and change quantity from 0 to 1. • The Stock Screener query window will automatically appear on your screen defaulting to a built-in query.
View What Filters Make up the Query	Go to the Stock Screener Menu Bar and click ***View > Query Description***.
View a Different Query	Go to the Stock Screener Menu Bar and click ***Built-In Queries*** to view the list.
Create Your Own Query	Go to the Stock Screener Menu Bar and click ***User Queries***. Clicking ***Edit*** will allow you to edit User Queries, while clicking ***New*** will allow you to create a new query.
Save Your Queries	1. Go to the Stock Screener Menu Bar and click ***File > Save Query File As***. A pop up box will appear allowing you to save the query to your computer's hard drive. 2. Select the location where you wish to save the query. Saving your query in the same place as the built-in query will make it easier to find all of the queries in one location. 3. Type the name you wish to save it as and click ***OK***. 4. You will see the file you just saved appear under File. The 5 most recent files that you viewed will be displayed, with the most recent one 'checked'. 5. The title bar will show a new line with **File: (name of your file)**, example shows *Technology.qry*
Load a Symbol into the Trading Window	Right-click on the symbol in the Stock Screener window and click ***Load [Symbol] into Trading Window***.
Search for News on a Symbol	Right-click on the symbol in the Stock Screener window and click ***Recent Stories for [symbol]***.
Research or get an Extended Quote for a symbol in the	Right-click on the symbol in the Stock Screener window and click ***Research/Ext. Quote for [symbol]***.

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Stock Screener	

QUICK REFERENCE: LEVEL II

Obtain Level II Access	• If you are unable to see Level II quotes, check to see if you are eligible. Go to the Trading window, ***Settings > General > L2 Data***. If you are qualified for Level II access, you should be able to click the ***Book*** quotes checkboxes. If those checkboxes are grayed out, please contact your Schwab Active Trader Team. • Access to Level II data requires meeting certain eligibility requirements based on trading frequency. Please contact your Schwab Active Trader Team to determine if you qualify for Level II access.

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